

Montana State University

FY19 Operating Budget Metrics

Revenue

Expenditures

Staffing

Waivers

Enrollment

Montana State University

Current Unrestricted Revenue & Metrics

REVENUE	FY15	FY16	FY17	FY18	FY19	Difference	
					Budgeted	1yr	5yr
State Support	\$54,520,666	\$60,068,014	\$61,400,867	\$59,792,465	\$60,428,262	1%	11%
Net Tuition Revenue	\$112,491,462	\$117,684,947	\$129,025,065	\$134,929,186	\$140,148,584	4%	25%
Transfers/Other	\$813,816	\$2,034,522	\$6,056,554	\$3,362,719	\$7,711,974	129%	848%
Total Operating Revenue	\$167,825,944	\$179,787,483	\$196,482,486	\$198,084,370	\$208,288,820	5%	24%
Scholarships/Discounts/Waivers	\$20,922,752	\$21,162,454	\$23,082,556	\$26,359,092	\$29,318,640	11%	40%
Special Approps/OTO/MUS-RP	\$864,265	\$9,599,805	\$709,379	\$729,712	\$750,000	3%	-13%
Total Current Unrestricted	\$189,612,961	\$210,549,742	\$220,274,421	\$225,173,174	\$238,357,460	6%	26%
Student FTE	13,550	13,935	14,839	15,134	15,374	2%	13%
Resident Students	8,753	8,820	9,190	9,342	9,357	0%	7%
Non-resident Students	4,797	5,115	5,649	5,793	6,017	4%	25%
Key Metrics							
State % Share	32.5%	33.4%	31.3%	30.2%	29.0%	-1%	-3%
State Support per Res FTE	\$6,229	\$6,810	\$6,681	\$6,401	\$6,458	1%	4%

(based on Total Operating Revenue, net of waivers, special approps, & MUS_RP)

- **State % Share - drops to 5 year low (29%), lowest in the System, peers = 55%** (includes agencies)
- **State Funds per Resident – lowest of MUS Ed. Units, peer median = \$10,086** (includes agencies)

Montana State University

Current Unrestricted Expenditures & Metrics

EXPENDITURES	FY15	FY16	FY17	FY18	FY19	Difference	
					Budgeted	1yr	5yr
Instruction	\$90,853,319	\$98,189,218	\$106,391,381	\$107,174,257	\$112,917,083	5%	24%
Academic Support	\$24,803,262	\$25,431,430	\$26,940,025	\$27,020,560	\$28,405,877	5%	15%
Student Services	\$14,739,890	\$15,114,404	\$17,757,498	\$17,955,114	\$19,047,355	6%	29%
Institutional Support	\$14,358,413	\$15,032,691	\$17,810,105	\$17,499,829	\$18,453,283	5%	29%
Operation & Maintenance	\$19,914,354	\$23,063,607	\$23,450,961	\$23,229,457	\$26,191,602	13%	32%
Research	\$2,357,668	\$1,025,646	\$1,577,331	\$1,117,115	\$1,155,090	3%	-51%
Public Service	\$2,328,757	\$2,557,202	\$2,509,245	\$2,874,964	\$2,868,530	0%	23%
Total CU Exp (net of waivers/SA) →	\$169,355,663	\$180,414,198	\$196,436,546	\$196,871,296	\$209,038,820	6%	23%
Student FTE	13,550	13,935	14,839	15,134	15,374	2%	13%
Key Metrics							
% Instruction Exp	54%	54%	54%	54%	54%	0%	0%
% Instruct/Acad/Stud Ser	77%	77%	77%	77%	77%	-1%	0%
Expenditures per Student	\$12,499	\$12,947	\$13,238	\$13,008	\$13,597	5%	9%

(based on Total CU Exp - net of waivers; includes MUS_RP and PBS)

- **Instruction – 24% increase over 5 years, comprises 54% of total expenditures** BOR target = 50%
- **% Instruction + Aca Support + Stud Service is consistently 77%** BOR target = 70%
- **Expenditures per Student – 9% increase over 5 years, 88% of peer group median** (includes agencies)

Montana State University

Current Unrestricted Faculty/Staff FTE & Metrics

(does not include: graduate teaching/research assistants & part-time/other)

STAFFING	FY15	FY16	FY17	FY18	FY19	Difference	
					Budgeted	1yr	5yr
Contract Faculty (all)	684	710	756	781	825	6%	21%
Contract Administrators	26	28	29	34	38	11%	43%
Contract Professionals	284	288	298	260	267	2%	-6%
Classified FTE	470	486	523	537	605	13%	29%
Total Faculty/Staff	1,464	1,512	1,605	1,612	1,734	8%	18%
EXPENDITURES							
Personnel Services	132,999,087	139,331,896	152,190,183	154,630,549	163,094,197	5%	23%
Total Expenditures (net of waivers)	169,355,663	180,414,198	196,436,546	196,871,296	209,038,820	6%	23%
Student FTE	13,550	13,935	14,839	15,134	15,374	2%	13%
Key Metrics							
Student to Faculty Ratio	19.8	19.6	19.6	19.4	18.6	-4%	-6%
%Personnel Services of Total	78.5%	77.2%	77.5%	78.5%	78.0%	-1%	-1%

- **Student to Faculty Ratio – budgeted for 18.6 to 1, peers = 18 to 1**
- **Personal Services % Share – budgeted for 78%, HECA* benchmark = 75%**

*Higher Education Cost Adjustment, higher education specific inflation index developed by SHEEO

Montana State University

Discounts, Waivers & Scholarships (source: CHE 104)

DISCOUNTS/WAIVERS/SCH	FY15	FY16	FY17	FY18	FY19	Difference	
	Budgeted					1yr	5yr
BOR Designated	\$4,624,501	\$4,305,631	\$4,443,686	\$4,337,616	\$4,450,457	3%	-4%
Resident Discretionary	\$2,063,278	\$1,974,697	\$1,866,361	\$1,805,935	\$2,012,398	11%	-2%
Non-resident Discretionary	\$13,161,795	\$13,800,313	\$15,146,541	\$18,826,875	\$21,488,734	14%	63%
Scholarships	\$1,412,285	\$1,646,206	\$1,625,967	\$1,388,666	\$1,367,051	-2%	-3%
Total Discounts/Waivers/Sch	\$21,261,859	\$21,726,847	\$23,082,555	\$26,359,092	\$29,318,640	11%	38%
Student FTE	13,550	13,935	14,839	15,134	15,374	2%	13%
Key Metrics							
Waivers per Student FTE	\$1,569	\$1,559	\$1,556	\$1,742	\$1,907	9%	22%
Average Net Revenue per FTE							
Non-resident				\$16,241	\$16,295	0%	-
Resident				\$11,264	\$11,503	2%	-
Difference				\$4,977	\$4,792	-4%	-

Policy 940.13: The Montana University System must ensure that the average net tuition revenue per non-resident student (not including WUE students) exceeds the average net tuition revenue plus state appropriations per resident student. In other words, net educational revenues per student FTE must be greater for the non-resident student population than the resident student population.

- **Waivers per student: budgeted to increase by \$165 per student**
- **Net Revenue per Student Benchmark: Yes, meets required levels**

Montana State University

Fiscal Year Student FTE - Average Annual Enrollment

ENROLLMENT	FY15	FY16	FY17	FY18	FY19 Budgeted	% Change	
						18 vs 19 Projected	Fall 2018 YTD*
Resident Undergrad	7,996	8,115	8,421	8,562	8,577	0.2%	-1.0%
Resident Graduate	757	705	769	780	780	0.0%	0.0%
Non-resident Undergrad	3,700	3,784	3,980	4,241	4,394	3.6%	6.0%
WUE	776	945	1,149	1,052	1,124	6.8%	0.2%
Non-resident Graduate	321	386	520	500	500	0.1%	1.0%
Student FTE Total	13,550	13,935	14,839	15,134	15,374	1.6%	1.0%

*Fall 18 YTD as 9/9

Reminder: preliminary census enrollment is recorded following the 15th day of class, final enrollment at end-of-term, fiscal year enrollment = ((summer + fall) + spring) / 2

- **1-year Budgeted: 1.6% increase, growth of 240 student FTE**
- **Fall 2018 YTD: 1.0% year to date growth for Fall 2018**
- **5-year: 13.5% increase, growth of 1,824 student FTE**